Fact Sheet

MYOB Accountants Office

Practice Manager

Optimised Control

Central to the Accountants Office suite, Practice Manager delivers total control over jobs, time, costs and processes, ensuring maximum productivity and profitability. Time is captured effortlessly and bills are processed fast. Practice Manager includes our market leading job tracking tool which lets you efficiently allocate jobs, manage milestones and ensure you deliver great client service every time.

Real time insight

Every team member has their own digital dashboard providing information important to them. At a glance, see a snapshot overview of practice WIP – including jobs in need of attention – so nothing is missed. To see what makes up any figure, simply click through the graph. Homepages include:

+ Aged WIP and Debt
+ Top ten WIP, Debt, Lock Up Clients
+ Practice KPIs such as WIP days, Debtors days, and Average Hourly Rate
+ Team productivity
+ 12-month rolling graphs covering Time, Billing, and Debtors.

The homepage shows information in real time, so you have quick access to the most up-to-date information about your practice. This means you can make decisions with the most reliable and current information at hand.

You can see exactly how you are tracking against your budget – right from the desktop – at any time. Don't wait for reports at the end of a month – information is now at your fingertips every time you log in.

For deeper analysis, you're able to drill down into the graphs and lists to see what's behind the numbers.

Everything you need in just a few clicks

Whether you focus on tax compliance services or business advice, you need to stay competitive by working cost effectively. Practice Manager automates your processes and systems so you can efficiently manage your time, costs, people and work.

Easy job tracking

It's crucial that your practice stays on top of jobs and meets its deadlines. Practice Manager incorporates Job Manager – a simple and user-friendly job-tracking tool which allows you to:

+ Deliver great client service by hitting due dates
+ Quickly and easily allocate jobs
+ Get a practice-wide view of all jobs at any time
+ Display jobs by group or 'slice and dice' to sort jobs by user
+ Manage major milestones
+ Integrate with the client database and timesheets
+ Report on practice KPIs.

Never miss deadlines

Managing practice jobs is easy with enhanced filtering and drag/drop functionality in the main workflow screen. A single mouse click filters out jobs that are about to break budget or miss deadlines. Users can simply group jobs to see what is due in a week, what jobs are held up with queries, and work ready to be billed – without having to run a report.

Faster timesheet navigation

Access your timesheets with just one click using the top Tool Bar which is visible in all screens, no matter where you are in the program. Once in a timesheet, you can easily navigate between days to quickly review or amend them.

Easy billing and invoicing

Practice Manager's easy-to-use Billing Wizard logically guides you through the process, making sure you miss nothing. It also gives you the flexibility to bill clients the way you want.

To save you time, you can automatically insert standard paragraphs into an invoice, based on the type of work completed. You can also copy wording from a previous invoice.

Bulk invoicing options make it easy to create a batch of draft invoices based on client and/or WIP selection criteria.

Invoices are based on Microsoft Word® templates, so you can easily create and update professional-looking invoices to suit your practice and your clients. You can easily update these templates as needed.

Improve efficiency and data accuracy

Access your clients' AccountRight data file directly within the Accountants Office suite – whether the file is stored locally on your network or in the cloud. Reduce the complexity associated with managing various versions of AccountRight within your practice.

Simplify and centralise MYOB access

Employee MYOB Logins to access all MYOB products and services are easily managed directly from Accountants Office suite.

Store everything you need to know about your clients

Practice Manager makes it to easy store and retrieve client information for marketing, compliance or reporting purposes. It gives you the power to identify opportunities to further build your practice by giving you deeper insights into your business and your clients.

And as well as storing contact details, including multiple addresses and phone numbers, relationships and notes, you can create custom fields and lists to help categorise this important and valuable data.

Family Groups – see the true worth of every client

All products in the Accountants Office suite feature Family Groups, a tool which allows you to see the true worth of a client to your practice. Family Groups allow you to:

+ Understand a client's true debt position in Debtors
+ Ensure all jobs are completed before signing off client work in Job Manager
+ Understand the true worth of your clients in WIP and Billing Reports.

Find client files fast with powerful search functions

+ Auto-complete functions make it faster to search and find clients
+ Locate clients using an ABN or a TFN to save time when processing assessments
+ Create in seconds ad-hoc client lists for birthdays or Family Groups.

Reports that matter

Practice Manager allows you to refine the included Standard Reports to create new reports that focus on what matters to you and your team. You can sort, filter and re-order content with a few clicks, and save favourite reports for everyone to use.

The standard reports include; client summaries, control reports, aged WIP/debt, employee productivity and analysis. You can also export information to Microsoft Excel® for further analysis.

Data mining

As part of the Accountants Office suite, Practice Manager integrates with Tax. This means you can use the reporting to combine tax data and practice management data into a single report.

About Accountants Office

Ideal for a sole practitioner or smaller practice, MYOB Accountants Office suite pulls together the most common tools you need and links them seamlessly. Standardised configuration, reporting and simplified workflows mean you can spend more time focused on your clients. Accountants Office gets the job done – faster, easier and smarter.

Need more information?

For more information about the service, contact your Client Manager or contact MYOB on the details below.

Australia
1300 555 666
accountants@myob.com.au
myob.com

New Zealand
0800 94 96 99
accountants@myob.co.nz
myob.com

GPS251085-0617